

Director's Office Tracking System (DOTS) User Info

The Director's Office Tracking System (DOTS) is a system designed for one-screen data entry for Director's Office Action or Informational Items. This system's purpose is to track and report these items.

To access the system, under NETL Software Central, double click on INFOSYS and then select the DOTS icon. At any point, the <ESC> key can be pressed and it will back out of the current data entry and allow the user to exit the system. This can be useful if something occurs that keeps the user from continuing with data entry (possible system error or outside circumstances that make backing out necessary).

GENERAL DATA ENTRY (Director's Office OM):

On entering the system, the user will be presented with the data entry form. The user should immediately choose "Action" or "Info" item, as this will update the form and grey out any fields that are not needed for entry of that choice. The user then may proceed through the form using either the mouse, tab, or <Enter> key. Certain fields may not allow the user to proceed until the data entered is correct, and the user should receive informational messages explaining what is wrong -- e.g., wrong date, data needs entered here, etc. ("Scan Date," "File Name," and "E-Mail Date" are disabled fields, as is the "MAIL" button, and are not used at this time.) After all entry is completed, the user then should click either the "SAVE" or "NEW" buttons. "SAVE" will do exactly that -- save the record (if all required data is entered and validated correctly), but will stay on that record. Clicking on the "NEW" button will prompt the user if the record should be saved, and then move to a blank form for the next new entry.

ACTION/INFO TRANSMITTALS (Director's Office OM):

"PRINT" will print the current record on the entry screen to either an ACTION TRANSMITTAL or INFO TRANSMITTAL sheet, as indicated by the type of record. It will preview on the screen first, and then the record may be printed by selecting the print option under FILE at the upper left corner of the screen. Note: To print an updated record, you must first hit "SAVE" before printing for any changes to be reflected in the printed copy.

EXTENDING A DUE DATE (All Office Managers):

Office Managers will be responsible for entering extended due dates if necessary. For those actions with a due date specified by the initiator, the OM must contact the initiator for an extension. For those actions with a system default due date (10 working days), the OM does not need to contact the initiator for an extension. Use "FIND" to locate the action by tracking number. Enter the extended due date in the top right of the data entry form then hit "SAVE." If there are any comments that need to be made, they can be entered in the "Comment" block before saving.

CLOSING AN ENTRY (All Office Managers):

4.4 DIRECTOR'S OFFICE TRACKING SYSTEM (DOTS) USER INFO

Office Managers will be responsible for closing out the actions assigned to their groups. Use "FIND" to locate the action by tracking number. At the bottom right of the data entry form, there is a field labeled "Date Action Completed." Enter the closing date and hit "SAVE" to update this record. If there are any comments that need to be made, they can be entered in the "CLOSE-OUT COMMENTS" field before saving.

If the action produces a document--correspondence, forms, reports, etc.--the Action Office must ***print the transmittal indicating the completion date, staple it to the front of a copy of the document produced, and mail it to John Uziel, Mailstop 922-Lobby***, for inclusion in the DOTS centralized filing system. Note: This does not rescind the OM's responsibility of keeping the official record (file copy) of correspondence and other documents for their division.

REPORTS (All Office Managers):

"REPORTS" will take the user into another screen from which different reports and sort preferences may be selected. The user can choose to preview a report on the screen or to print it.

This system is in phases of development and will be changing periodically to accommodate the modifications. If you have any questions or encounter difficulties, please call Biff Armstrong at (304) 285-4056.